How to grant delegate access to email and calendar

About Delegate Access

Beyond merely sharing Outlook folders, Delegate Access enables you to grant additional permissions, such as allowing a delegate the ability to create e-mail messages or respond to meeting requests on your behalf.

As the manager, your mail must be delivered to your mailbox on the Exchange server, not to an Outlook Data File (.pst) on your computer. You and the delegate must use the same version of Outlook.

As the person granting permission, you determine the level of access that the delegate has to your folders. You can grant a delegate permission to read items in your folders or to read, create, change, and delete items. By default, when you add a delegate, the delegate has full access to your Calendar and Tasks folders. The delegate can also respond to meeting requests on your behalf.

There are three delegate permission levels:

- **Reviewer:** With this permission, the delegate can read items in the manager's folder.
- **Author:** With this permission, the delegate can read and create items, and change and delete items that he or she creates. For example, a delegate can create task requests and meeting requests directly in the manager's **Task** or **Calendar** folder and then send the item on the manager's behalf.
- **Editor:** With this permission, the delegate can do everything that an Author has permission to do and additionally can change and delete the items that the manager created.
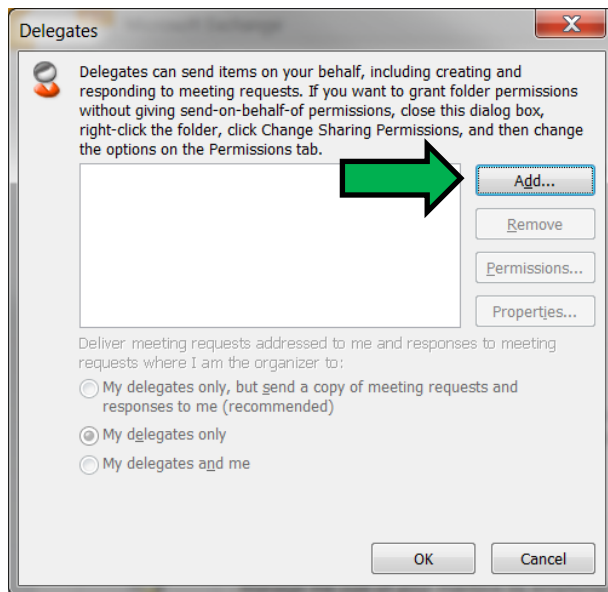
How to grant delegate access

A delegate automatically receives Send on Behalf permissions. By default, the delegate can read only the meeting requests and responses sent to the manager. The delegate does not have access to read any other messages in your Inbox.
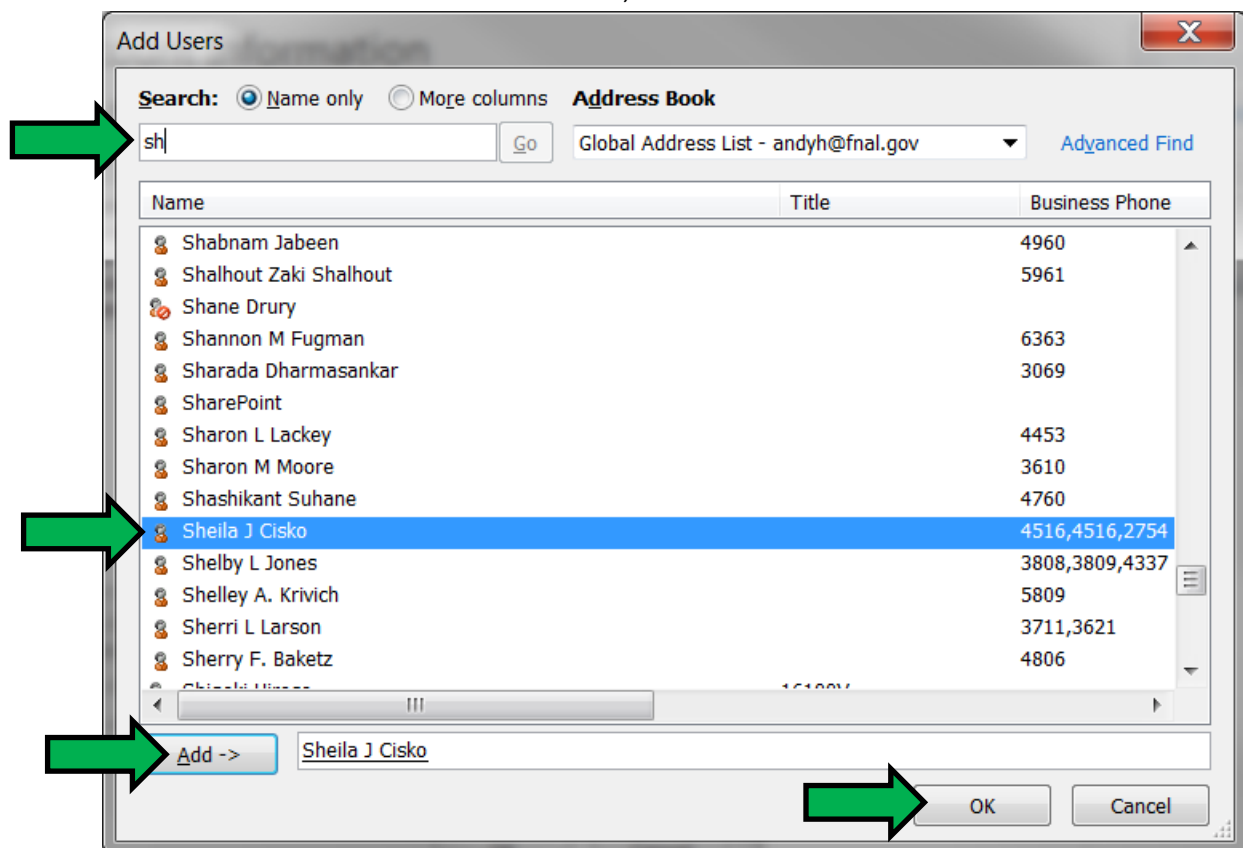
1. Click the "File" tab. Then click "Account Settings > Delegate Access".
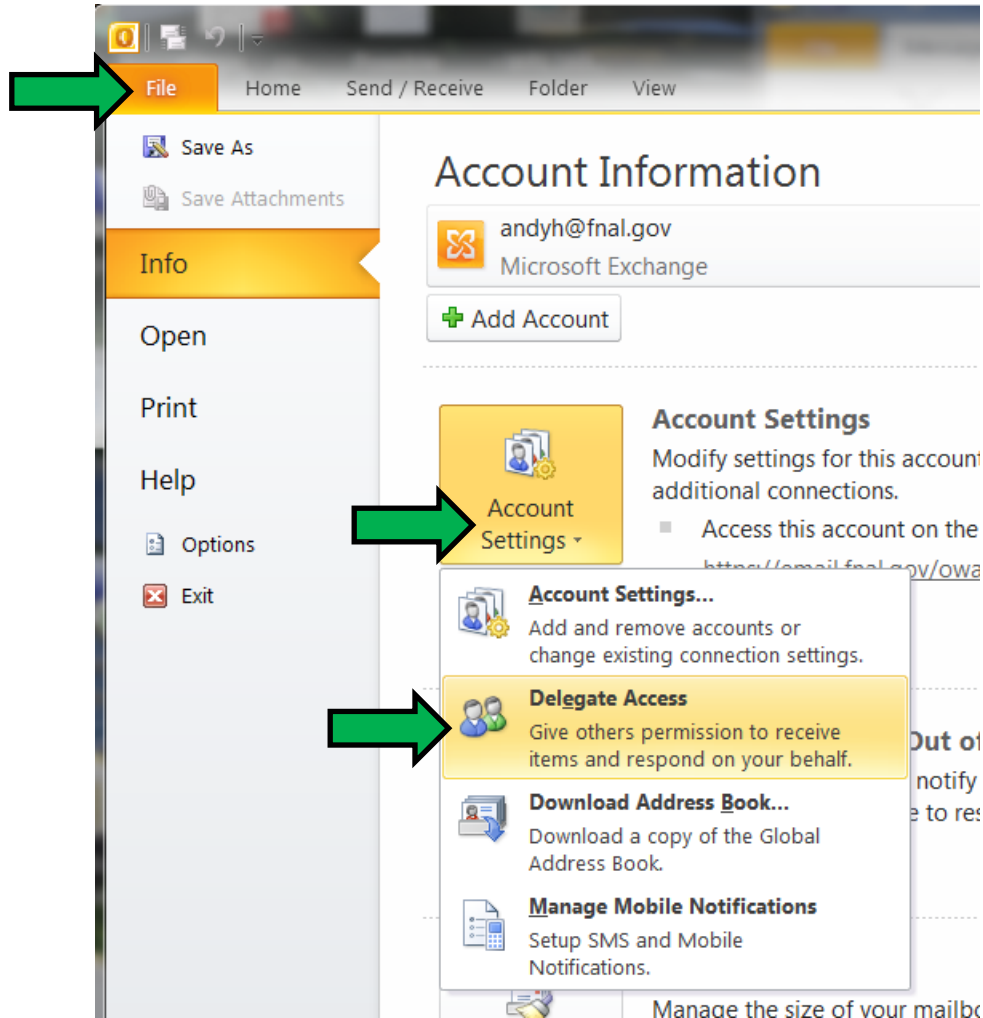
2. Click "Add…"

3. Enter the name of the person whom you want to designate as your delegate, or search for and then click the name in the search results list, click "Add->" and then click "OK".

4. By default, the delegate is granted Editor (can read, create, and modify items) permission to your Calendar folder and Tasks as well as receiving a copy of meeting related messages sent to you. When the delegate responds to a meeting on your behalf, it is automatically added to your Calendar folder. In the "Delegate Permissions" dialog box, you can accept the default permission settings or select custom access levels for Exchange folders.
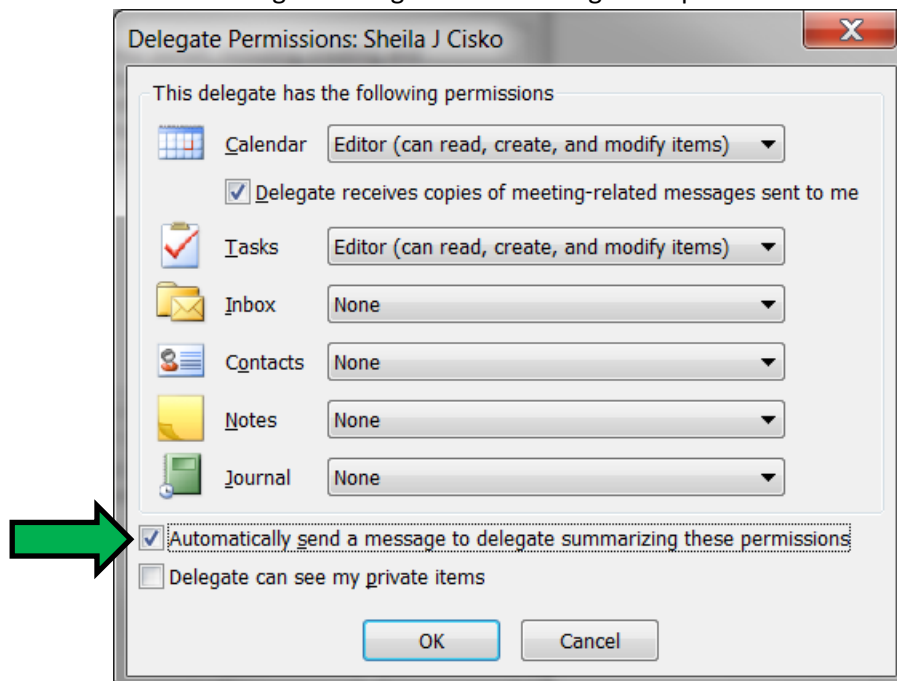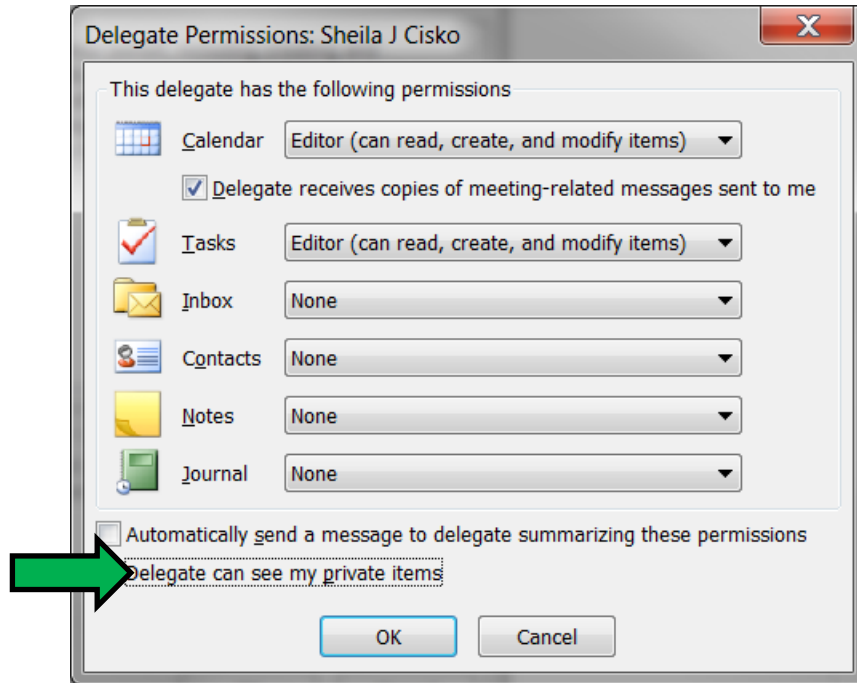
Default Settings
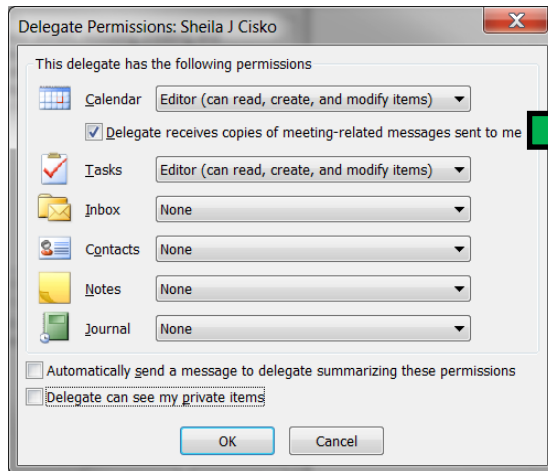
Custom settings
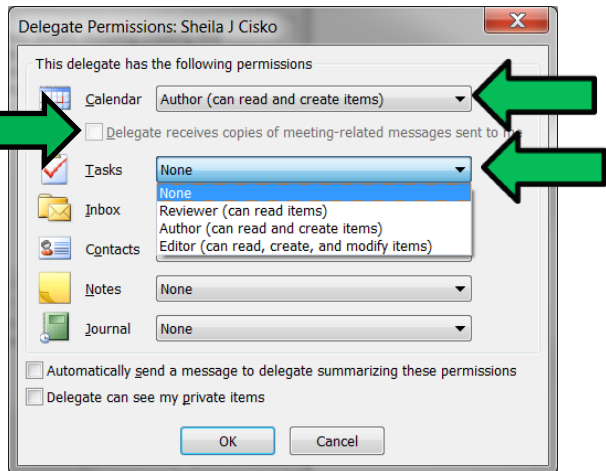
5. To send a message to notify the delegate of the changed permissions, select the "Automatically send a message to delegate summarizing these permissions" check box.

6. If you want, select the "Delegate can see my private items" check box.
   Important note: This is a global setting that affects all of your Exchange folders, including all Mail, Contacts, Calendar, Tasks, Notes, and Journal folders. You cannot allow access to private items in only one folder.

7. Click "OK".

How to change permissions for your delegate

1. Click the "File" tab.
2. Click "Account Settings > Delegate Access".
3. Click the name of the delegate for whom you want to change permissions, and then click Permissions.

   Note: If you want to remove all Delegate Access permissions, do not click Permissions but instead click Remove and skip the remaining steps.
4. Change the permissions for any Outlook folder that the delegate has access to.
5. To send a message to notify the delegate of the changed permissions, select the "Automatically send a message to delegate summarizing these permissions" check box.

   Note: If you want copies of meeting requests and responses that you receive to be sent to a delegate, make sure the delegate is assigned Editor (can read, create, and modify items) permission to your Calendar folder, and then select the "Delegate receives copies of meeting-related messages sent to me" check box.

How to change delegate access to private items

If you have assigned permissions to a delegate so that he or she can access your Outlook folders, you can hide personal information in appointments, meetings, tasks, and contacts. Open each personal item, and on the "Calendar Tools" tab, in the "Tags" group, click "Private".

If you want to give a delegate access to see your private items, do the following:

1. Click the "File" tab.
2. Click "Account Settings > Delegate Access".
3. Click the name of the delegate for whom you want to change access to your private appointments, and then click "Permissions".
4. Select the "Delegate can see my private items" check box.

Note: You should not rely on the Private feature to prevent other people from accessing the details of your appointments, contacts, or tasks. To ensure that other people cannot read the items that you marked as private, do not grant them Reviewer (can read items) permission to your Calendar, Contacts, or Tasks folder.